Purchased Life Annuity
Application Form

(Under Section 717 of the Income Tax (Trading and Other Income) Act 2005)

STANDARD LIFE

PLA30ANN

When we refer to 'Standard Life' we mean 'Standard Life Assurance Limited'.

Who this form is for

This form is for people who want to apply for a Standard Life Purchased Life Annuity.

Filling in this form

By filling in this form, you are applying to enter into a contract with Standard Life. This Application form and the quotation will be the basis of the contract if your Application is accepted. Until the Application is accepted, **our liability is limited to the return of the purchase price to the person making the payment.**

The terms and conditions relating to the contract and a copy of this completed Application form will be made available on request.

Before completing this form please read Your Guide to Annuities (ANN10) and the appropriate Key Features Document (PLA17 ANN). You will also need a quotation from us. Your financial adviser will be able to get this for you.

Date of quote D D M M Y Y Y Y

Gross annuity p.a. quoted £

Please answer all questions correctly. Failure to give correct answers could invalidate the contract. Please use BLOCK CAPITALS to fill in this form. Do not use correction fluid if you make a mistake. If you need to correct a mistake, please initial any changes you make.

If you are receiving advice from a financial adviser, remember that the adviser is acting on your behalf not only by giving you advice, but also regarding how this form is filled in.

To help us keep our records up to date please answer the following questions:

1 Do you have an existing plan with Standard Life?
If yes, please answer questions 2 and 3. If no, please go straight to Part 1. Yes ☐ No ☐

2 If you have, and you used a different name, please give that name.

3 Do you want your existing plan(s) updated using your new name? Yes ☐ No ☐

Part 1 purchaser details

The Purchaser(s) is the person(s) buying the Annuity and is regarded as the owner for tax purposes.

Purchaser A	Purchaser B
Title (Mr/Mrs/Miss/Ms/Other eg Dr/Rev) Male ☐ Female ☐	**Title** (Mr/Mrs/Miss/Ms/Other eg Dr/Rev) Male ☐ Female ☐
Surname	**Surname**
First Name(s) in full	**First Name(s)** in full
Address	**Address**
Postcode	Postcode
Telephone (include area dialling code)	**Telephone** (include area dialling code)
Home	Home
Work	Work
Mobile	Mobile
E-mail address	**E-mail address**

The Annuitant(s) is the person(s) on whose life the Annuity is based and can be different from the Purchaser.

When you return this form, please enclose the Annuitant's birth certificate. If the Annuitant is a married woman, please enclose the marriage certificate. The marriage certificate is needed to link the names shown on the birth certificate with those shown on the Application Form. Any other changes of name should be supported with the appropriate evidence, eg deed poll or adoption certificate. **Please note we will not make any annuity payments until we receive the certificates.**

In certain circumstances, evidence of good health is required. This will be noted on the quotation. The supplementary questionnaire LPR131 must be completed in respect of the Annuitant, and submitted with this Application. If an adverse underwriting decision is given, we will not be able to accept your Application.

A civil partnership is a legal contract between two partners of the same sex.

Part 2 Annuitant details

Annuitant A

Title (Mr/Mrs/Miss/Ms/Other eg Dr/Rev)

Male ☐ **Female** ☐

Surname

First Name(s) in full

Address

Postcode

Telephone (include area dialling code)

Home

Work

E-mail address

Date of Birth D D M M Y Y Y Y

National Insurance No.

Marital Status

Single ☐

Married/Civil Partnership ☐

Separated ☐

Divorced/Dissolved Civil Partner ☐

Widowed/Surviving Civil Partner ☐

Annuitant B

Title (Mr/Mrs/Miss/Ms/Other eg Dr/Rev)

Male ☐ **Female** ☐

Surname

First Name(s) in full

Address

Postcode

Telephone (include area dialling code)

Home

Work

E-mail address

Date of Birth D D M M Y Y Y Y

National Insurance No.

Marital Status

Single ☐

Married/Civil Partnership ☐

Separated ☐

Divorced/Dissolved Civil Partner ☐

Widowed/Surviving Civil Partner ☐

The Annuity purchase price should be payable by cheque made out to 'Standard Life Assurance Limited'. This cheque must come from your own bank or building society.

Part 3 Details of the purchase price

How much do you want to pay into your Annuity (minimum £5,000) £

Part 4 How do you want the Annuity payments made?

We will pay the annuity payments directly to a bank or building society account. Please fill in the account details.

Please fill in the relevant bank/building society account details.

Name of bank or building society

Name(s) of Account-holder(s) to be credited

Address of bank or building society

Number of account

Postcode

Branch Sort Code

With some building society accounts we are required to credit the society's own bank account and they then credit your personal account. Please check with your building society to see if this is necessary. If it is then please ask them to supply the following information.

Name of bank or building society

Number of account

Branch Sort Code

Part 5 Data protection notice - important please read

All parties named in this Application form have a right to know that Standard Life holds personal data about them and what it will be used for. Please give them the opportunity to read this notice.

Personal information provided in connection with your application will be used by Standard Life to set up and administer the plan.

If your application does not proceed it will be held on our records for 6 years before it is deleted. We will keep the information you have supplied confidential, and will not disclose it unless it is lawful to do so.

If you have appointed a financial adviser, we will give them information about the plan and, where appropriate, send copies of correspondence to them to enable them to give you advice.

We and the other subsidiaries of Standard Life plc would like to contact you from time to time to keep you up to date with special offers, new products and services, newsletters and other promotions. We will never pass your details to companies that are not subsidiaries of Standard Life plc for marketing purposes.

If you do not want to be kept informed, please cross this box ☐

If you would like to request a copy of the personal data we hold about you, please write to the Data Protection Co-ordinator at our Head Office. We may charge a fee for providing this information.

Part 6 Money laundering regulations

To comply with Money Laundering Regulations 2003, we may verify your identity, by carrying out an on-line check with a reference agency. Where an on-line check is carried out, the agency will verify your identity against public records and it will also check whether you have a credit history (but it will not disclose any information about your actual borrowings). The agency will add a note to show that an identity check was made to your credit file, but this information will not be available to any third parties. We regret that we cannot offer an alternative unless the on-line check does not confirm your identity in which case, we will carry out a manual check.

This declaration must be signed by **all Purchasers.** Please also ensure that the quotation is signed and returned to Standard Life together with any other required documentation.

Part 8 Declaration – MUST BE COMPLETED

Declaration by Standard Life

In the event of Standard Life Assurance Limited accepting this Application Form and quotation it hereby agrees to pay an Annuity in accordance with the basis shown in this Application Form and quotation.

Declaration by the Purchaser

1. I declare that to the best of my knowledge and belief the answers given in this Application are correct and complete. I agree that these answers, along with the attached quotation will be the basis of the contract between myself and Standard Life Assurance Limited.
2. I have read and understood the Data Protection Notice. I agree that my personal information (including sensitive data) may be used for the purposes described (subject to me exercising my right not to be contacted with details of other products and services).

Signature of purchaser

Date D D M M Y Y Y Y

Signature of purchaser

Date D D M M Y Y Y Y

Financial adviser's details

If you are receiving advice from a financial adviser, please ensure your adviser completes this section, including adding their company stamp. **Your application may be delayed if this is omitted.**

Name

Financial Adviser Stamp

Address

Postcode

Intermediary reference number

Name of contact

Location

Basis of Sale

Whole of Market ☐ Other ☐

If other please specify

Did you give advice?

Advice ☐ No advice ☐ (eg Execution only)

Commission Basis

Note: If you leave this box blank, we'll pay commission on the basis agreed for this scheme.

Type of commission	% of entitlement
Regular Premium Initial Commission (RPIC)	%
Fund Based Commission (FBC)	%
Level	%

Money laundering

Money laundering form completed and attached ☐

FSA or Authorisation number